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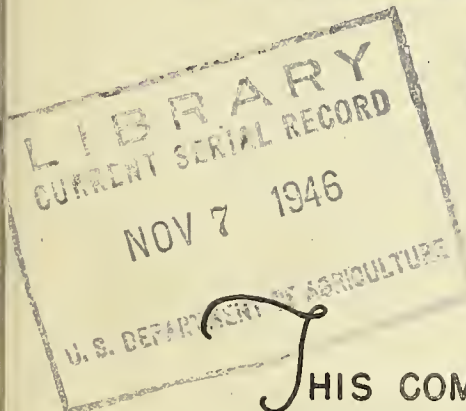
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WORLD FOOD PROSPECTS FOR 1946-47

THIS COMPLETES THE SERIES OF THREE MONTHLY REPORTS ON THE WORLD FOOD SITUATION REQUESTED BY THE PRESIDENT'S FAMINE EMERGENCY COMMITTEE. THE CHIEF PURPOSE OF THESE REPORTS HAS BEEN TO INDICATE GROWING CONDITIONS IN RECENT MONTHS AFFECTING FOOD PRODUCTION IN THE VARIOUS PARTS OF THE WORLD THIS YEAR COMPARED WITH LAST YEAR WHEN PRODUCTION WAS GREATLY REDUCED BY SEVERE AND WIDESPREAD DROUGHT. THE NEXT REPORT GIVING PRELIMINARY APPRAISAL OF THE FOOD SITUATION FOR 1946-47 CONSUMPTION YEAR IS SCHEDULED FOR NEXT OCTOBER AND THE FINAL REPORT FOR FEBRUARY 1947.

CURRENT REPORTS OF THIS KIND WILL BE ISSUED IN THE FUTURE WITHIN A SERIES DESIGNATED "FOREIGN AGRICULTURAL CIRCULAR" AND KEYED TO INDICATE SUBJECT MATTER COVERED. PREVIOUS REPORTS OF THIS TYPE WERE "FOREIGN FOOD PRODUCTION - CURRENT PROSPECTS FOR 1946-47," ISSUED MAY 26, 1946, AND "WORLD FOOD PROSPECTS FOR 1946-47," ISSUED JULY 1, 1946.....

WORLD FOOD PROSPECTS FOR 1946-47

SUMMARY

Improved crop conditions indicate a world food production in 1946-47 somewhat larger than in 1945-46, but below the prewar average. This increase, however, will be largely offset by this year's sharp reduction in carry-over, chiefly of bread grain, leaving the world's total food supply uncomfortably low.

Between mid-June and mid-July improvements in crop conditions in North America and Central Europe were about offset by deterioration in Russia and South China. The new crop in North Africa and southern Europe has already eased the tight food situation somewhat in these areas. In addition, summer vegetables are now plentiful throughout most of Europe.

In several of the far eastern areas, the food situation continues to deteriorate despite the availability of locally grown vegetables, and it is anticipated that many will die of starvation before the fall rice crop is harvested. Even though the limited food supplies available should continue to move to these areas, only partial relief of famine conditions could be achieved because of insufficient transportation facilities for moving supplies into the interior.

Conditions continue to indicate a world wheat crop this year considerably larger than that of 1945-46. A near record crop is in prospect in North America; a substantial increase in production is indicated in Europe, North Africa and Turkey, and a somewhat larger acreage has been planted in the Southern Hemisphere. A continuation of favorable prospects in the latter area could result in an average world crop in 1946-47 nearly equal to the prewar average of 5.9 million bushels as against the 5.2 billion bushels harvested last year. The decline in wheat stocks, however, largely offsets the anticipated increase in this year's production. Supplies of wheat as of July 1 in the principal surplus producing countries were 400 to 500 million bushels less than a year ago and stocks are also low in most of the importing and self-sustaining countries.

The world rye crop will be substantially below prewar although probably above last year's short crop. While the world rice crop may be somewhat larger than last year's short crop, it will be considerably below the prewar average particularly in the surplus producing areas of southeastern Asia. Consequently, wheat will continue to be the main commodity entering world trade for relief in the deficit food producing areas during 1946-47.

World conditions indicate a somewhat larger sugar crop during 1946-47. In the United States the forecast beet and cane crops indicate approximately 2.2 million tons (raw value equivalent) of sugar or about one-fourth more than in 1945. While the increase in production of sugar beets in Europe may not be as large as anticipated earlier, the acreage

is somewhat larger than a year ago. The proportion of the crop which will be used for sugar, however, is dependent upon the feed supply, transportation facilities, and fuel for processing plants. An increased cane acreage in Cuba is indicated for early 1947 harvest and conditions to date have been favorable for the crop. Prospects for obtaining sugar from the Far East, however, are still very uncertain. Production of sugar in the Philippines is expected to increase somewhat but will still remain below domestic needs.

Supplies of edible fats and oils continue to be far below requirements and prices in a few countries have advanced sharply, making it increasingly difficult to obtain supplies for relief purposes. Prospects still point to inadequate supplies during 1946-47 although considerable progress is being made at expanding copra production in the Philippines and in the Netherland Indies.

A record United States crop of feedgrains is in prospect according to the July 10 crop report. The record production should provide larger supplies than anticipated of feed for livestock and should permit some quantities, both of grain and livestock products, to be exported. In other areas of the world restricted supplies of feed and the marked advance in prices during the past year are reducing the feeding of livestock, especially hogs and poultry. Hence, world supplies of meats, dairy products and eggs are likely to be smaller during the consumption year 1946-47 than during the past year.

Crop conditions in Europe continue to indicate a total food production in 1946-47, about 88 to 90 percent of prewar compared with a level not exceeding 80 percent of last year. In the Southern and Western areas crop conditions continue good and the spring drought in the Central and Eastern regions has been broken with only partial damage to crops. The greatest decline in food production during the current year in comparison with prewar will be in Hungary, Austria, Germany and Poland.

In North Africa the reported wheat and barley harvest of 3 million short tons is sharply above that of last year but much below the prewar level. Some improvement is also expected in the production of olive oil and substantial quantities of fruits and vegetables should be available for export but sugar, as always, will have to be imported.

In the Far East expansion of food production is being retarded in many areas by political disturbances, uncertainty as to prices for rice and unfavorable weather conditions. The shortage of cereals in several areas is becoming acute and little relief is in prospect until the new rice crop becomes available this fall.

In India the summer rains have started and conditions are favorable for a normal acreage of crops, but in the rice growing areas of China weather conditions continue unfavorable and it is doubtful if the acreage and production of rice in 1946 will be much larger than last year.

The acreage in food production in Japan is being expanded as much as possible but production will be below average because of the shortage of fertilizer.

Crop conditions in the Middle East are even more favorable than in 1945 when this area was not only self-sufficing but also exported some cereals and dried fruits. All countries in the area except Afganistan report favorable conditions, and the region as a whole is entering into another year of generally sufficient food supplies and some exportable surpluses.

Some crop deterioration has occurred in the Soviet Union since the middle of June due to hot weather in central European Russia and poor crop prospects in many Southern regions. Other areas report favorable crop conditions but yields for the country as a whole are not expected to exceed the low average of recent years and may be less. Thus, with a planted crop acreage probably about 90 percent of prewar, total food production in the prewar boundaries of the Soviet Union will be below the prewar average though probably considerably above a year ago.

In North America conditions point to another near record year of production for food crops. Crop conditions in United States on July 1 were the best on record except for 1942. The acreage of wheat in Canada has been increased about 10 percent above last year and crop conditions up to early July were above average. Stocks of grain in North America, however, have been sharply reduced during the past year and supplies of meats, eggs, and dairy products may be smaller in 1946-47 than in 1945-46.

Although in some areas of South America excessive rainfall has hindered the planting of winter grains, in general the acreage is somewhat above that of last year and conditions are favorable. Exports of food products from the Southern Hemisphere have increased and during the latter half of the year are expected to be considerably larger than the small exports in the latter half of 1945.

Conditions for food production in the British Southern Dominions are also much better than a year earlier. The drought has been broken in New Zealand and excellent weather conditions are encouraging for the next season crop and livestock output. The planting of wheat acreage in Australia is virtually completed and the total acreage is about 13 million acres or about 17 percent above last year's acreage. Production of dairy products has been well maintained and slaughterings of cattle for export are expected to be resumed by mid-July with the settlement of the meat-workers strike in Queensland.

The Union of South Africa is expanding its wheat acreage in an effort to be more self-sustaining in cereals but even the large wheat crop this year would not offset the shortage of the corn crop and provide sufficient cereals for average consumption. The shortage of fats and oils in South Africa is especially acute as the dry weather of recent months has reduced the production of oil bearing crops and imports which are normally obtained from India have been cut off because of the food shortage in that country.

CONTINENTAL EUROPE

Production Outlook for the 1946-47 Consumption Year

Crop prospects for continental Europe as a whole continue to be much better than a year ago. Total food output, in terms of food energy, for the 1946-47 consumption year may still be forecast at 88-90 percent of the 1933-37 average, as compared with 80 percent or less for 1945-46.

As in earlier reports, the appraisal of food output prospects is based on the assumption that the wartime diversion to food uses of products formerly used for feed will be continued in the coming consumption year. Thus the estimate makes allowance for much higher than normal bread grain extractions, for the admixture of grains formerly not used for food, and other similar shifts in utilization. Total agricultural output in 1946-47 certainly will be considerably less than the relatively high food output estimate of between 88 and 90 percent of prewar given above. It is largely through those shifts in the utilization of agricultural output compared to prewar that such a level of food production may be attained - at the expense of the qualitative composition of the diet.

Latest reports still indicate that the Continent's 1946 grain and sugar-beet crops, though well below prewar, will be considerably larger than in 1945. Production of fats and oils is also expected to recover somewhat in the coming season, due mainly to an expected increase in olive oil output. Little change is anticipated for most other foodstuffs.

The Mediterranean area, which in 1945 was hit by a severe drought, will contribute substantially to the increase in the Continent's output. Winter grain prospects apparently have not been materially lessened by the heavy rains reported for much of this area in the late spring and early summer. Forecasts received from Italy, Greece, Spain and Portugal, when wheat harvesting was in its early stages, indicate that wheat production in these four countries combined may rise from around 55 percent of the prewar average in 1945 to 85 percent in 1946. Barring unfavorable weather during the remainder of the growing season, output of most other crops, including corn, potatoes, olives, and (in Italy) sugar beets, is also expected to be much above the low 1945 level.

Western Europe, where the shortage of fertilizers has been considerably relieved and weather conditions continue favorable on the whole, will also have a substantially larger crop output in 1946 than in 1945. Estimates of the wheat harvest in France now range from 75 to 85 percent of the prewar average (1933-37), as compared with less than 60 percent in 1945. Forecasts of other grains also indicate a marked increase in output, and conditions are at present satisfactory for potatoes and sugar beets. The reported acreage under grain, however, though up some from 1945, falls short of the wartime, not to mention the prewar average, and the anticipated increase in sugar-beet acreage has been far from realized.

In contrast to France, the Low Countries will have crop acreages not only above 1945 but also above prewar. However, definite tendencies to shift back to prewar patterns of land utilization have established the 1946 food crop acreage at a level measurably below the wartime peak in the Netherlands and even somewhat under the 1933-37 average in Belgium. Yields are still estimated considerably higher than in 1945 though the Netherlands had a dry spring and Belgium, like France, had continued wet weather in May and June. Quantitative estimates of the wheat and rye crops in the Low Countries run from 75 to 80 percent of the 1933-37 average, and very much higher than a year ago.

In Switzerland, continuation of wartime controls has assured grain, potato, sugar beet, and oilseed acreages on the high level of the war years, and good crop yields are expected.

Prospects in Northern Europe are for little change in production as compared with last year. Such information as is available at present indicates good crops in the Scandinavian countries. Finland, still anticipates below average yields as a result of adverse weather conditions.

The dry spell reported so widely from Central and Eastern Europe two months ago has since been broken in most parts of the area. In Austria, where the rains came late, wheat and rye suffered less damage from the prolonged dry period than anticipated but yields are not expected to fall to the low 1945 level. A still greater decline has been forecast for barley and oats yields.

In Germany, prospects for a recovery in production remain doubtful. While acreage is apparently up some from 1945, weather conditions thus far seem to have been less favorable than during last season, and all four zones are suffering from the continued acute shortage of fertilizer. Before the war fertilizer was applied more heavily in Germany than in any other continental European country except the Netherlands and Belgium. Signs of delayed planting and use of inferior seed are also reported to be visible in the British Zone. Production forecasts for the various zones have not yet been received, but according to the latest report, yields in the American Zone are unlikely to exceed last year's, even with favorable weather.

Reports from Poland indicate that official forecasts of acreage and yields are unduly pessimistic. Even so, the production outlook remains far from good.

Crop prospects in Czechoslovakia continue to be much better than in neighboring countries, partly because Czechoslovakia's agriculture has had fewer war-caused difficulties to contend with and partly because it has enjoyed more favorable weather conditions on the whole. However, neither acreage nor yields are expected to reach the prewar average.

In the Danube Basin, the damage to winter-sown grains caused by moisture deficiency has not been nearly so severe this year as last, and weather conditions since late May have favored the growth of corn and other spring sown crops. Harvest prospects at present appear most favorable in Bulgaria, where the acreage planted so far is reported not only to be above

that of 1945 but also to approximate the prewar average. Rumania and Yugoslavia should also have good harvests if weather conditions are fairly favorable during the remainder of the growing season. On the other hand, there is little doubt that in Hungary, where the dislocation of farming activities caused by the war and its aftermath has been greater and spring weather this year more adverse than in the other Danube countries, crop output will be much below normal.

Present Food Situation in Continental Europe

The improvement in the 1946 wheat crop, now largely harvested in southern Europe, has already been reflected in the food situation there. In Italy, where wheat deliveries so far have been much better than anticipated, the small bread and alimentary past rations were increased effective July 15. In Spain, the still smaller bread rations were raised on July 18. Olive oil rations, however, have been further reduced. While the official UNRRA ration in Greece was not increased in July, marketed supplies of grain from the new crop, which is not rationed, have become more plentiful.

The food situation in Germany remains grave. Rations are still low in the American Zone, though a small increase for larger cities was made on June 24, and they will still be low in the Soviet Zone even if the increase reportedly proposed for August is put into effect. The position in the British Zone continues precarious and is adversely affecting work output. Consumption in Austria also continues low. The food situation in some urban areas in Poland also is not good.

Conditions in the urban areas of Hungary, especially Budapest, are still much more difficult than in the other Danube Basin countries where some improvement has taken place of late, especially in the deficit regions of Yugoslavia.

No further cuts in rations have been reported from Northern or Western Europe. In Czechoslovakia, where the food situation during 1945-46 compared favorably with that in Western Europe, the improvement registered in recent months continues.

According to the latest computations, average per capita daily nonfarm consumption, both rationed and off the ration, continues at 2,600 calories or above in Sweden and Denmark, but Switzerland is below this level. It is still between 2,100 and 2,400 calories in France, Czechoslovakia, Belgium, Luxembourg, the Netherlands, and Norway. For Italy, Spain, Portugal, Greece, and Finland, the range is now probably between 1,800 and 2,000 calories. In Germany and Austria, the nonfarm population still has an average of less than 1,600 calories.

FRENCH NORTH AFRICA

Food production in French North Africa in 1946-47, though remaining well below the prewar average, will, as was stated in earlier reports, be far larger than in 1945-46. The recovery is due to a marked increase in yields per acre which last year were heavily cut by drought. Sown acreages are reported to have fallen below 1945, which was lower than the prewar level.

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Wheat and barley, the two chief food grains of French North Africa, account for most of the sown acreage (44 and 40 percent, respectively, of the total in 1933-37). According to official estimates, which seem low, the 1946 wheat acreage is 73 percent of the 1933-37 average, and the 1946 barley acreage only 56 percent. However, even official forecasts indicate unit yields above the prewar level for both crops. These forecasts put wheat production at 87 percent, and barley production at 66 percent of the 1933-37 average.

While the Government forecast of 3,300,000 short tons for wheat and barley together is almost certainly too low, it is probably comparable with the official estimate of little more than 1 million short tons for 1945. Since French North Africa received something less than 2 million metric tons of food grains from overseas in 1945-46, requirements equal to last season's can be covered by domestic production alone during 1946-47. It must again be emphasized, however, that during the last prewar years (1933-37), when the population was less than 80 percent as numerous as at present, retained supplies (production minus net exports) averaged some 3.4 million metric tons.

It is still too early to say much about olive oil production in 1946-47, except that it is likely to be well above the low 1945-46 level. Unless the peak of 1939-40 is again reached, output will not suffice to maintain prewar per capita oil supplies for the present population, for the region was hardly self-sufficient in vegetable oils before the war.

Prospects for most other crops are also favorable. Output of livestock products, on the other hand, may be smaller than in 1945-46, when an acute shortage of feed caused abnormally heavy slaughterings as well as high mortality rates.

With the expected recovery in domestically-produced food supplies, import requirements in 1946-47 will be much below the 1945-46 level. French North Africa will hardly be in a position, however, to resume its prewar status as a net exporter of food, even if the ineffective system of food controls can be made to function better. Substantial quantities of fruits, vegetables, and wine should be available for export. Net imports of grains and fats are more likely than net exports. Sugar will have to be imported, as always, to supply domestic requirements.

SOVIET UNION

Some deterioration between the middle of June and early July due to abnormally hot weather and insufficient rain in a large area of Central European Russia appears to have occurred. The outlook for the 1946 harvest is rather spotted. Condition of potatoes in this area is poor, and oilseed prospects are uncertain. Some improvement, however, has resulted from recent rains. In southern Ukraine, Crimea, and Bessarabia, crop prospects also appear to be poor. Better conditions prevail in northern Ukraine, other western and northern regions of the Soviet Union and North Caucasus. In the Asiatic part of the country good harvest prospects are indicated.

The overall grain yields for the Soviet Union, based on early July conditions, are not likely to exceed the low average of recent years, and may be below average. With both yields and acreage below prewar, grain production probably will be considerably smaller than the prewar volume.

The feed supply situation in many regions is poor; straw generally short and thin; oats, barley and hay crops are poor. Increased pre-winter slaughter of livestock and low production of dairy products is probable in Central European Russia to Don area, and through the southern Ukraine.

Rapid ripening of winter grain advanced harvest 10 to 15 days in the south and southeast. The gap between the maturity of winter and spring grain has been narrowed. The harvest is in full swing in the South and is extending northward from day to day.

Soviet press stresses the need of speeding up harvest to avoid losses, and urges immediate deliveries of required grain to government procuring agencies.

MIDDLE EAST

Aside from Saudi Arabia and Palestine, which are normally food importing countries, the Middle East faced the year 1946 with confidence. Weather conditions during the winter and spring of 1946 were ideal for crop growing and for grazing pastures. There were no waves of severe cold and rain was abundant and well distributed, especially during the critical spring months. Consequently, preliminary estimates of the crops that have already been harvested or will be harvested this fall indicate that the region as a whole is entering upon another year of sufficient food supplies and exportable surpluses.

Egypt

The wheat crop this summer suffered, as it did last year, some damage from rust. Consequently there may be need for some imports of this commodity to meet the country's requirements until the next harvest, in the summer of 1947. There are abundant stocks of corn, the staple diet of the Egyptian peasants, to meet all local demands until the next harvest in the fall. The barley and grain sorghum crops are expected to be less than last year's crops. On the other hand, an exportable surplus of some 150,000 tons of cleaned rice is expected from this year's crop. Furthermore, a surplus of over 45,000 tons of old crop grain sorghum has been offered for export and largely sold to India.

Production of dry legumes is estimated to be about the same as it was last year, which will be sufficient for local consumption.

Vegetable oil, mainly cottonseed oil, is in ample supply at present. The outlook for the 1946-47 consumption year is good, for plans have already been made, as in recent years, to make good the deficit in cottonseed production by importations from the Sudan.

Turkey

Livestock, mainly sheep and goats, which is an important source of food in Turkey, continues to be in excellent condition. In recent months substantial livestock exports have been made to neighboring countries, especially to Syria, Lebanon and Palestine.

Production of grain crops, that are now in the process of being harvested, is about 1,000,000 tons greater than last year and only slightly below the prewar average. Turkey, therefore, will be able to meet its requirements of grain until the next harvest and offer some surplus for export.

Sugar stocks from last year's best crop are more than ample for local consumption until the harvest of the new crop next fall. The outlook for this is very promising. Good weather conditions prevailed, and sugar production is expected to be as high as last year.

Prospects for the production of olive oil and dried fruits are promising. Turkey will be able, as usual, to export substantial quantities of dried fruits - figs and raisins - and possibly some olive oil.

Iraq

Iraq is normally a surplus food producing country, mainly dates, grains and livestock products. Aside from heavy floods from the Tigris, which caused some damage in the southern region, weather conditions were ideal for crops and livestock. Excellent grain crops are now being harvested, and the exportable surplus for the consumption year 1946-47 is estimated at more than 300,000 tons of barley and wheat. In addition there will be the usual substantial exports of dates. Exports of livestock and livestock products are expected to be made to the neighboring countries.

Syria and Lebanon

Like Iraq, but on a smaller scale, Syria is normally a producer of surplus food, mainly grains and olive oil. Good weather conditions and timely rains prevailed during the growing season, and the grain crops now being harvested are expected to produce a surplus (beyond the needs of Syria and Lebanon) of some 50,000 tons for export. The olive crop harvested in the fall of 1945 in both countries was excellent. There was a surplus for export of about 8,000 tons of olive oil. Prospects for the new crop that will be harvested next fall are good.

Palestine

The olive crop of last year was excellent and the country has sufficient stocks of oil to meet its needs until next harvest. Cereal crops now being harvested are average. However, Palestine has been progressively becoming a heavy importer of foodstuffs due to a rapid increase in its population. Consequently, in order to meet its food needs for the year 1946-47 it will have to depend upon heavy imports of grains, sugar, livestock and livestock products.

Iran

No crop estimates are yet available for Iran. However, the indications are that the harvests this summer and next fall will be as good as last year, supplying the country's needs and leaving some surplus of grain and dried fruit for export. At present there is some surplus of grain from last year's crop that has been offered for export.

UNITED KINGDOM

Crop conditions in Britain improved considerably during the first week in July with warm, sunny weather following a cold and rainy June. Principal grains such as wheat, barley and oats are now expected to produce normal yields if favorable weather for maturity continues until harvest. A recent announcement of 1946 grain crop acreages in England and Wales reveals decided declines as compared with areas devoted to the same crops last season, reflecting a tendency to shift back to the prewar pattern of production. The estimated area of wheat is 2,024,000 as compared with 2,180,000 acres in 1945, while oats plantings declined from the 1945 acreage of 2,310,000 to 2,130,000. The barley area is estimated at 1,925,000 acres in comparison with the previous crop year figure of 1,984,000. Prospects for potato and sugar beet crops are considerably below average. Excessive June rains affected the hay crop unfavorably, but prospects for most fruit crops are generally promising.

With the shortages of feed grains and concentrates, the outlook for livestock in the United Kingdom is not very favorable. The 1946-47 production of meat and dairy products is expected to fall far below that of last year. Milk production for the fall and winter months may drop as much as 8 to 10 percent from that of 1945-46, while hog marketings are expected to decline about 15 to 20 percent.

There was a general tightening in allocations of certain critical food items, chief of which are flour and bread. In an effort to conserve depleted wheat and flour stocks until grain is available from this year's harvest, the British Ministry of Food ordered the rationing of bread, flour and wheat foods as of July 21. The scheme provides for a daily allowance ranging from 5 ounces for infants to 9 ounces for non-priority adult consumers. Larger allocations of 11 and 15 ounces will be available to approximately 12,000,000 manual workers. Fluid milk supplies decline and weekly allowances to non-priority consumers were reduced from 3 to $2\frac{1}{2}$ pints on June 30 with a corresponding reduction of supplies to catering establishments from 9 to $7\frac{1}{2}$ pints per 100 hot beverages served.

Simultaneously with the announcement of bread rationing, Britain's basic weekly meat allowances for adults was increased from 1s.2d. per week to 1s.4d. This increase must be taken up in canned meat as there is no increased supply of fresh meat available at this time. Fresh fish supplies---more than double the amounts of war years---are available off the ration and consumption of fish was further encouraged during June by Government action reducing the price. This is the fourth decrease in the selling price of fish in the past year.

Housewives and consumers have been allowed additional ration points---making an average of 26 points per four week period beginning July 21. Dried eggs which became available for the first time on the points ration system as of June 23 are valued at 8 points per 5-ounce packet, and equivalent to one dozen shell eggs. Consumers will be free to spend as many or as little of their monthly allocation of points on dried eggs as desired.

The passage of the British Lorn Act by the United States Congress will ease the British foreign exchange situation and make it possible for the United Kingdom to increase its purchases of needed foodstuffs abroad when supplies are available. The actual amount of basic foodstuffs such as wheat that will be purchased in the United States will depend not only on available supplies, but also on the extent to which prices in the United States rise above prices in other supplying countries.

BRITISH DOMINIONS

Canada

Wheat plantings in Canada are about 10 percent above last year. Although moisture conditions in some of the Prairie Provinces were still slightly below normal in June, more favorable temperatures and rain fall have been noted during early July, and it is believed that if equally favorable conditions prevail until August an above-average wheat crop will result. Wheat carry-over stocks are expected to approach the low level of 50 million bushels by July 31 as compared with the 1945 carry-over of 258,400,000 bushels.

Stocks of coarse grains, principally oats and barley have been reduced to the lowest level of several years. Acreages planted to oats and barley vary from 5 to 10 percent less than last year's plantings respectively with the largest proportion of decrease centered in the Prairie Provinces, while latest reports of growing conditions would indicate that only average crop yields can be expected for 1946. Dry weather is adversely affecting hay and pastures in Quebec and the Maritime Provinces.

Conditions still continue favorable for a good fruit yield, especially in British Columbia and Ontario. Recent predictions indicate that the 1946 potato crop should total around 74,000,000 bushels which represents about a 23 percent increase over 1945 production.

Inspected cattle slaughterings for the 28 week period of 1946 ending as of July 13 totalled 723,204 as compared to 782,089 for the same period of 1945. Slaughterings of hogs likewise declined from 3,485,315 in 1945 to 2,493,087 for the first 28 weeks of 1946 representing an estimated decrease of 28 percent.

The increased diversion of milk into the fluid sales market so reduced cheddar cheese production in many sections of Quebec and Ontario that declines were noted as high as 30 percent during the first 5 months of 1946 as compared with the same period of 1945. As a result the Dairy Products Board is falling short on its cheese commitments of 125,000,000 pounds to the British Ministry of Food.

The Canadian Government has now advised that the entire cheddar cheese production of Quebec and Ontario from June 1, 1946 until further notice shall be diverted to the Dairy Products Board for export. This action was deemed necessary in order to insure Canada's cheese commitment to Great Britain for the current contract period ending March 1947.

Egg marketings have declined on the average around 7 percent during the past month while poultry marketing--especially of lighter weight chickens--has increased as a result of decreased feed grains and also the satisfaction of the consumers demand for increased meat supplies.

Canada's restricted domestic meat supplies will be augmented by a considerably increased allotment of salmon. An estimated 500,000 cases or about 66 2/3 percent more salmon will be available to Canadian consumers in 1946 than in 1945. It is pointed out that this larger proportion of salmon for the domestic market is due principally to the unusually large catch of sockeye salmon this year. The total pack of all salmon in Canada for 1946 is believed to be about 1,900,000 cases which should provide an estimated 1,400,000 cases for export.

Australia

July conditions in Australia on the whole were favorable for crops and pastures except in northern New South Wales and all of Queensland. In these two sections both crop and livestock production suffered from very dry to drought weather influences. Plantings of the early 1946-47 wheat crop are virtually completed and it is estimated that the area sown to wheat will be about 13 to 13.5 million acres which is about 17 percent above last year's acreage. The rice harvest, now complete, is conservatively estimated 50,400 short tons of paddy rice, all of which, with the exception of small domestic and military requirements, will be available for export.

Dairy production on the whole has been well maintained. The output of butter and cheese has been particularly high in Victoria during the past few months, although in New South Wales and Queensland a seasonal decline in production has been accentuated by the shortage of rainfall. Butter and cheese production registered increases of 14.4 and 43.6 percent respectively during the first 5 months of 1946 as compared with the corresponding period of 1945, making an estimated cumulative total production for the eleven months ending May 31 of 155,305 short tons of butter and 43,471 short tons of cheese.

The meat workers strike in Queensland which began in March ended in July. As a result of the strike, cattle slaughterings for export were held up for many weeks. Livestock is now suffering deterioration on account of the drought conditions in that state. The shortage of skim milk and cereals and diversion of wheat to export markets has also resulted in a decline in pork production. It is probable that these factors effecting decreases in both beef and pork output will lessen the original 1945-46 total estimate of Australian meat production by approximately 62 thousand short tons carcass weight, making a total production estimate of 1,024 thousand short tons. Total exports of meat for the current year are expected to decline from a previously estimated 319 to 297 thousand short tons.

New Zealand

Weather conditions in New Zealand have been favorable during the early winter months for livestock and crop production, and have largely offset the ill effects of the past season's drought. Much interest has been shown in efforts to increase late fall and early spring sowings of wheat which it is hoped will cover an area of around 250,000 acres. Planting of the late fall wheat was practically completed by June 1.

In order to conserve needed wheat supplies, the Government has recently ordered a reduction in allocation of wheat for poultry feed as well as restricting use of other grains as feedstuffs. An order was also issued to curtail illegal sales of cream in order to assure more butter for export.

Butter and cheese gradings for export continued to decline during the months of April and May. Butter gradings dropped to 10 million pounds in April as compared with a little more than 20 million pounds of a year ago, while in May a further decrease was noted equal to about 2/3 of the April figure. Likewise, cheese gradings dropped in April to almost 14 million pounds as compared with 17 million pounds in the same month of 1945, and May gradings declined to about 12 million pounds or approximately 14 percent below the previous month.

Union of South Africa

Allocation of food supplies in the Union of South Africa is now being considered for the remaining months of the 1946 season in conjunction with the food rationing system soon to be adopted in the Union of South Africa. The estimate of corn production for the 1945-46 season has not changed from last month's report of 1,875,000 tons. This quantity, plus contracted imports of approximately 350,000 tons, makes an estimated total supply of 2,220,000 tons. The next wheat crop will yield around 600,000 tons (slightly above average), about 75,000 tons short of meeting 1946 needs before the new crop is harvested.

The fats and oils situation in South Africa is especially critical. An estimated 48 million pounds of butter, including imports from South-West Africa, was available for 1945-46 consumption. As a result of the drought conditions, the peanut crops of both the 1944-45 and 1945-46 seasons were far below prewar averages. In former years peanut stocks have generally been supplemented by substantial imports from India which are no longer available. Aside from peanuts, a staple food of the natives, only small quantities of soybeans and sunflower seed contribute to the present supply of edible fats. Lard has never been important in South Africa as hog production is largely of the bacon type.

Cattle marketings were somewhat below normal as of July 1, although bacon, ham and cheese production seemed well maintained with bacon and ham output averaging around 7 million pounds for the first five months of 1946 in comparison with a total of 18 million pounds in 1945, while cheese totalled about 7 3/4 million pounds as compared with a total 1945 production of 15 million pounds. However, milk and other dairy and meat products are expected to be in shorter supply in the last half of 1946 and early 1947 as a result of further substantial decreases in feedstuff allowances planned for September and November.

Sugar stocks are ample for the one-pound weekly ration soon to be inaugurated. It is reported that the citrus fruit crop will be around 5,000,000 boxes which is just slightly more than 75 percent of the average of crops of the previous five-year period.

THE FAR EAST

India

Favorable spring and summer rains are reported in India to date. Though serious damage was done to the spring rice crop in most sections due to heavy rains, soil preparations and sowing of the winter rice (the big rice crop of the year) are now in progress and the outlook at this time is good. The winter crop usually constitutes around 80 percent of the total. There is a general scarcity of milk in some sections and also a shortage of flour and sugar. Rice and other cereals are also short and rising prices have put supplies out of the reach of the masses. Some sections are endeavoring to grow short-term crops during the hot weather. Sweet potatoes and peanuts are being used to supplement their diet.

Today the focal point of famine and food shortage is shifting from Madras to Bengal. In the Bengal area a famine of the 1943 proportions can develop in the critical months prior to this year's harvest of December. Sharply rising prices, giving rise to black marketing and hoarding, and the inability to enforce governmental controls appears to be following the 1943 trend of development. These human factors, which were pointed out in the 1943 Bengal Famine Inquiry Report, are on the increase.

There is less reason for famine to develop, as the total food supplies available from previous crops and from imports is greater than in 1943. The rice crop of 1945-46 of 9.3 million tons is 35 percent larger than the 1942-43 crop and some imports are being obtained this year from Burma and Siam. Sufficient stocks are not at hand to break blackmarketing.

The Punjab and North West India winter wheat crop has not been officially estimated, but it is reported to be below average.

China

Reports on the recent harvest of wheat and other winter crops in North China continue to indicate crops much better than those of 1945, and probably not far below the prewar average. With the harvest, the famine previously prevailing in Honan has been relieved, but famine persists in some local areas in other provinces. The prospects for the summer crops remain generally good. The carryover of wheat and other grains is very small. There is, therefore, a possibility of shortages appearing in the spring of 1947, before next year's harvest of winter crops. However, summer crops, particularly vegetables, will be helpful locally in ameliorating the food situation.

Crop conditions are reported quite variable in Central China. Autumn-harvested crops are of more importance, relatively, in this region than in much of North China.

For all of Central and South China, the rice crop is expected to be about the same as last year's or about ten percent below prewar, with the reduction centered in South China. Severe famine conditions in Hunan

have not been relieved by the winter crops, and starvation is expected to increase until the autumn harvest.

Refugees, presumably from famine areas in Hunan and Kwangtung, have helped create a food shortage in Kiangsi, Chinese sources report a rice shortage developing in the city of Shanghai. The necessarily small carryover of food in Central China, even where this year's crops and crop prospects are favorable, increases the danger of food shortages recurring in 1947. In South China, crops recently harvested are roughly fifty percent of last year's with only average fall crops a recurrence of food shortages seems probable in 1947, after this autumn's crops are exhausted.

No recent reports have been received on crop conditions in Fukien, Kweichow, and Yunnan, but preliminary reports from Chinese official sources indicated winter crops better than last year in Kweichow and Yunnan and equal to the 1944 crop in Fukien. Winter crops of recent years in these provinces, as in most of "Free China", have been reported much above prewar, due to expanded acreage.

Japan

In early June of this year the Japanese Ministry of Agriculture and Forestry estimated that the harvest of winter wheat and winter barley would be only about 1,790,000 short tons, due to failure to plant the intended area, unfavorable weather, and shortage of fertilizer. This estimate was believed by foreign observers to be as much as 10 to 15 percent too low, but even this would be only about two-thirds of the prewar crop. The outlook was favorable for the sweet potato crop but the yield of white potatoes was expected to be reduced through disease caused by the lack of good seed. Rice seed beds were reported in good condition.

Increased collections of 1945 crops have improved the current food situation. Receipts of wheat from the United States during June were very large. Imported foodstuffs have been released by General MacArthur's headquarters only when the release was necessary to prevent the breakdown of the rationing system; but these releases had to be increased in respect to area covered and tonnage distributed through May, June, and early July.

The harvest of the winter crops of wheat and barley even if smaller than usual, will be of some assistance in restoring the rations in deficit areas. As these provided only 12 percent of the total food supply before the war, however, the amount of relief from this source is not expected to be great and will depend, furthermore, on the success of the Government's effort to procure supplies from the producers.

On June 22 an extension of the ocean fishing grounds available to the Japanese was authorized by General MacArthur's headquarters, and this is expected to result in an increase of some 3,000 to 5,000 tons per month in the amount of fish which will be available for consumption. The prewar consumption of marine products average nearly 3.5 million short tons annually. The fish catch during the first three months of 1946 was approximately two-thirds of the prewar consumption rate.

South Korea

It was reported in early June that growing conditions for barley and other summer-harvested crops had continued favorable during May, but good weather was being offset by the prevalence of smut and by the lack of fertilizer. Fall-harvested crops such as rice were expected to be adversely affected by the shortage of fertilizer, but it was too early for any reliable prediction of yields.

In the last few days of June the situation was greatly worsened by severe floods due to excessive rainfall, including a fall of 6 to 8 inches in some sections in a 24-hour period. The loss of barley and other summer-harvested grains due to the floods is estimated at 20 percent, and the tonnage now expected to be available for human consumption is only 550,000 short tons. This is only about one-third of the prewar harvest of wheat and barley for all the area, of which much the greater part was normally from South Korea. The flooding of rice paddies at this season is expected to reduce the autumn crop by only 5 percent. The washed-out paddies can be replanted to rice and other grains.

Considerable Government food stocks were destroyed by the flood, and remaining stocks are now estimated at only 15,790 short tons of rice and other grains. The rationed population in South Korea increased from about 3,700,000 on May 1 to about 4,900,000 on June 1, and has now increased to about 5,500,000 for July, due to the flood and cholera conditions. It had been planned to increase the ration allowance from 150 grams of cereals per person during May to an average of about 250 grams per day in June. The disruption of rail and other transportation due to the floods will greatly hinder the collection of food from the farmers; and the increased ration demands coincide with suddenly worsened supply conditions.

The Philippine Islands

The Philippine Islands began their independence with a short supply of rice and cereals throughout all the Islands. The 1945-46 rice crop is practically exhausted, and the rice shortage will become acute beginning in August. Some upland rice will be harvested in October and November but the Islands will be largely dependent on imported rice from July until late November when the main crop of irrigated rice is harvested.

Sugar supplies are limited although domestic production totalled 15,000 tons. About 5,000 tons of Cuban refined sugar are expected in July. The United States has allocated 15,000 tons and there has been some Peruvian refined sugar imported. The fishing industry, though still far below the prewar level because of the lack of boats and equipment, is increasing its supply steadily. Fresh meats are still 50 percent below normal.

The Luzon rainy season began in mid-June and the land is now being prepared for planting. It is expected that the planted area will be only 90 percent of the prewar acreage due to shortage of carabaos and agricultural implements, and the general unrest among the farmers.

Transportation inland and interisland has improved to such a great extent that there are now very few isolated shortage areas. The worst of the black market has been broken but there is still economic confusion as business readjusts itself.

Copra production now exceeds 50 percent of its prewar level, but the sugar industry is expected to need another 2 to 3 years to recover fully, and the abaca industry does not expect to reach capacity until 1949. The shortage of textiles, machinery, and agricultural equipment hinders the return to prewar levels of production.

Java

The political unrest in Java continues to restrict the normal movement of food products in the Netherland Indies. In Java, Indonesian forces still tightly control the interior where most of the food is produced; while the allied forces (Dutch and English) occupy the larger cities where the food shortage is acute. These closed political boundaries have made it impossible to obtain statistics on production but aerial photographs indicate that production is still below the prewar level. The loss of "nearly all" the carabaos has been reported and this would seriously handicap the production of rice. The disruption of communications and transportation have added further obstacles to the movement of rice from surplus to deficit areas.

So far little rice has moved even into the coastal cities where it is so urgently needed. Starvation of natives in areas outside these Allied-held cities have been reported to be increasing. There are also reported to be shortages in several of the outlying islands and in some of the more isolated districts of Java, so that although Java is exporting rice at this time, it is definitely not a surplus area.

French Indo-China

The French have not released any statements as to over-all crop acreages, yields, or accumulated old stocks. For the purpose of making allocations, the Government has tentatively indicated to the IEFC that 110,000 short tons of rice will be available for export during the last half of 1946. Conditions are still unsettled. Although the French and the Viet Nam faction have reached mutual agreement, there is still border strife and negotiations with Siam about the border provinces. Until order is restored in the country and communications are reopened, there seems little immediate prospect of procuring for export abroad the total surplus that may be available. Crop prospects for 1946-47 have not been indicated.

Siam

New crop prospects are uncertain because of lack of rain, and the tendency to hold supplies is increasing. Because of a few recent showers the Siamese Department of Agriculture is taking a moderately optimistic view, but the Chinese millers are far less optimistic. The lack of rainfall is not alarming, although there will be considerable uneasiness until the rains come steadily.

There has been a decreased flow of paddy to the market due to the low water level of the canals and to the termination of premium prices July 4 and the beginning of the basic price. Black market prices in neighboring countries higher than the Government price for rice is believed to increase the difficulty of procuring rice for export. Normally the large seasonal movement of paddy does not begin until September and by that time the market may have adjusted itself.

Burma

According to government reports Burma's 1946-47 rice prospects are good but acreage will be only about two-thirds of prewar. Last year's crop is now estimated at 2.7 million short tons or about 250,000 tons below estimated domestic requirements. Exports of rice from carry-over stocks are expected to total 350,000 short tons through August 15.

Malaya

Food supplies in Malaya continue very short. In May the rice ration in Singapore was cut to 3.3 pounds per man, 2 pounds per woman, and about one pound per child per week. At the beginning of the year it was estimated 500,000 short tons of rice would be needed during 1946.

LATIN AMERICA

Total wheat exports from Argentina, the principal food exporting country of Latin America, are expected to amount to almost two million short tons for the year 1946, as compared with 2.6 million short tons for 1945. Somewhat less than one million tons are expected to be shipped in the second half of this year compared with 1.1 in the same period last year. Corn exports for the present year are expected to total about 1.8 million short tons, which is nearly three times as great as in 1945, but only a third as much as in the pre-war years 1936-40. It is estimated that Argentine meat exports for 1946 will be slightly over 800,000 short tons as compared to 725,000 tons for 1945.

The food situation in Brazil is relatively good, except for critically short supplies of wheat, since imports in the first half year were only 40 percent as great as a year earlier. Increased acreages of corn and rice are reported as compared to a year ago, and yields are mostly better than average.

In Mexico, heavy seasonal rains have improved crop prospects. In Cuba supplies of dairy products and other foodstuffs for local consumption are good. Exports of sugar for 1946 are estimated at 4,000,000 short tons.

Argentina

Wheat exports based on unofficial data totaled 952,000 short tons from January 1 through July 10, 1946 which is somewhat below shipments during the same period last year. Total grain exports, including corn and oats, are greater this year than last, however. Weekly wheat shipments in June and early July were at a higher rate than during the early months of the year which is due in part to Government purchasing under a bonus, and partly to improving transportation.

The planting and early development of fall-sown grain has been favored by liberal rainfall and mild temperatures. Acreages exceeding those of the war years are expected. Wheat export estimates for the period July 1 through December 31, 1946 remain at 1.0 million short tons.

Corn exports from January 1 through June 30 totaled approximately 900,000 short tons in 1946 and 287,000 short tons in 1945. June 1946 corn shipments of 170,000 short tons represent a decline of 73,000 from the preceding month because of stricter export licensing measures and slow conditioning of the 1946 corn harvest as a consequence of heavy recent rains. However, it is now estimated that corn exports from July 1 through December 31 probably will total 900,000 or more short tons in 1946 compared to 343,000 short tons during the same period last year.

To ensure an adequate domestic supply and compel compliance with ceiling prices the Government has ceased issuing rice export permits.

Estimated meat exports for calendar year 1946 on a carcass weight equivalent basis in short tons are: beef, 515,000; mutton, 196,000; and pork, 94,000, giving a total of 805,000. The corresponding total estimate for the calendar year 1945 is about 725,000 short tons. Lard output has been decreasing for several months. Total outturn in 1946 probably will be only about one-third as great as in 1945. This is the result of a substantial disparity between hog and corn prices caused by heavy demand for export cereals.

Extensive liquidation of hogs which began over a year ago has continued in recent months because of sharp advances in corn prices. Hog production prospects may improve somewhat because of the cancellation on June 17 of a clause of the Anglo-Argentine meat agreement calling for delivery at one peso per kilogram of all lard derived from hogs slaughtered for export. Since then, this lard has been offered at open-market prices and its price has tripled. The cancellation has come too late, however, to materially improve pork and lard output this year.

Argentine exports are being delayed because of difficulties inherent in the Government's export licensing system. Large numbers of ships must wait in ports while official clearance is obtained on all export commodities.

Brazil

Brazilian imports of wheat and flour in terms of grain for the first half of 1946 were less than half those in the same period in 1945 and while some improvement is noted, they are still much below usual. Domestic corn and manioc are offsetting the reduced imports to a considerable extent. Lower grain supplies have reduced production of wheat mill feeds. This together with the seasonal pasture shortage is expected to reduced dairy production. There is also a heavy demand on the limited supplies of cottonseed cake and meal as a supplementary feed for dairy cattle, with the result that very little exports of this feed are expected to be available during the last half of 1946.

Although sugar stocks remain low, some exports of low grade sugar are being permitted. Prospects for the 1946-47 sugar crop have been good in the States of Pernambuco and Sao Paulo but dry weather during the first part of the year in the Rio de Janeiro area leaves that State's crop in doubt. Over half of Brazil's sugar crop is produced in these three states. The 1946-47 cacao crop prospects are also good and production is expected to exceed the 1945-46 crop of 110,000 short tons.

Reliable authorities are of the opinion that exports from Brazil during the last half of 1946 may reach 165,000 short tons of rice or over twice the amount exported in the same period of 1945. There may also be 165,000 short tons of corn as compared to practically none during the same period in 1945, about six times as many beans as last year during this time or about 39,000 short tons, 13,000 short tons of manioc flour and meal compared to 2,306 tons in 1945 and 30,000 short tons of canned meat and beef extract. During the last six months of 1945 canned meat and beef extract exports were only a little over 10,000 short tons but there were also exports of frozen and chilled meat equaling about 1,400 short tons.

Cuba

Heavy seasonal rains, which began in May, are continuing with favorable effects upon domestic food production with the exception of rice which has fallen behind the normal planting schedule because of the excessive rains.

The estimate of sugar production for early 1946 remains at 4,450,000 short tons. The outlook for the 1947 sugar crop continues to be encouraging and domestic production of fruits and vegetables remains at a high level.

There is an over supply of plantains, some of which are being exported to ease the local excess. There is also an abundance of potatoes. The pineapple shipping season is drawing to a close and avocados are now being exported in fair quantities. Supplies of milk and dairy products show a marked improvement as a result of current favorable pasture conditions but the beef supply remains short.

During the past month, imports of such necessities as wheat flour, rice, lard and vegetable oils have continued on a hand to mouth basis and stocks are very low, especially of flour and rice.

Mexico

There was a noticeable improvement by the end of June in the condition of pastures and livestock. The June rains were above average in all districts except the extreme west and northwest. Crop conditions also are slightly better than normal for this time of the year with adequate supplies of fresh vegetables. Supplies of wheat, corn, rice, sugar, fats and other basic foods continue to be below demand.

Despite some increase over last year in the harvest of winter and spring grown corn, stocks of old and new corn are insufficient in many districts. Bean supplies are also short in approximately one-fourth of the country; but chickpeas from the late June harvest are now being made available.

Anticipated exports for 1946 include an estimated 55,000 short tons of chickpeas, 100,000 tons of bananas, slightly less than 100,000 tons of tomatoes, 30,000 tons of pineapples, possibly a few thousand tons of beans and about 5,500 short tons of canned horse meat.

Other South American Countries

A critical food situation in Bolivia has been alleviated by the final negotiation of a long-pending informal agreement with Argentina for the shipment of 65,000 short tons of wheat during the remainder of the year. Wheat normally is imported in large quantities and the need for it is augmented by near failure of the current potato crop.

In Chile, the Government is requisitioning wheat and flour stocks to control prices. Failure to obtain imports of edible oil threatens to exhaust stocks. Exports of oats, barley, beans, garlic, onions, and dried fish during the first 5 months of 1946 are almost twice as great as during the same period in 1945. Somewhat larger quantities of rice, lentils, and mutton also have been exported. The liberal fall and early winter rainfall received to date presages good turnout of winter wheat and other fall-sown crops and assures normal supplies of irrigation water for the forthcoming summer.

Heavy rains in Paraguay have flooded pastures, resulted in low cattle weights, and are making it difficult to move cattle to market. Excessive rainfall has reduced the sugar content of cane but a crop of 18,000 short tons of sugar is expected from the current harvest. A direct subsidy is being paid to importers of wheat and wheat flour and existing import duties on them have been reduced 25 percent in an effort to insure adequate supplies at controlled price levels.

Peru is reported to be negotiating with Argentina for the delivery of 200,000 short tons of wheat in 1946-47 to cover domestic requirements. Argentina is to receive coal, petroleum, other minerals, and rubber in return.

Another short Uruguayan wheat crop appears in prospect for the coming year due to heavy rains currently impeding sowings of the grain. Exports of meat and meat products to date are below those for the same period in 1945. Serious shortages of eggs, milk, and butter still prevail chiefly because of forage scarcity, but the current wheat shortage has been alleviated by imports from the U.S. and Argentina. No additional cheese exports are in sight until next spring. Exportable surpluses amount to about 5,000 short tons of rice and 9,000 tons of canned turkey are available.